

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY  
USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT  
POLICY

Voluntary  Public

**Date:** 12/22/2016

**GAIN Report Number:**

## Poland

**Post:** Warsaw

### **Fish and Seafood Market in Poland.**

**Report Categories:**

Fishery Products

**Approved By:**

Russ Nicely, Agricultural Attaché

**Prepared By:**

Piotr Rucinski, Agricultural Specialist

**Report Highlights:**

In 2015 the total fish catch was 170,500 MT, which included the Baltic Sea and long-distance fisheries. Fish catch in 2015 was eight percent higher than in 2014 because the increased catch in the Baltic Sea offset a reduced catch in the long distance fisheries. The Polish fish processing industry is one of the largest in Europe. There are 262 processing plants eligible for export to the European Union and several hundred small, often family run companies which are permitted to sell products only to regional markets. Average annual fish consumption in Poland is almost 50 percent of average per capita fish consumption in the EU. Poland imports mainly raw fish which is used by the local industry for further processing.

## General Information:

### Production

#### Fishing sector

In 2015 the total fish catch was 180,717 MT, which included the Baltic Sea and long-distance fisheries. Fish catch in 2015 was eight percent higher than in 2014. Total amount of Baltic Sea catch in 2015 was 134,717 MT, a 14 percent increase compared to 2014. The main species caught were European sprat (64,175 MT), Atlantic herring (39,712 MT) and European flounder (13,617 MT). The total catch in the long-distance fisheries amounted to 48,992 MT, a six percent decrease compared to 2014. The main deep sea activity areas were in South Eastern Atlantic and North Eastern Atlantic fishing grounds.

#### Processing

The Polish fish processing industry is one of the largest in Europe. It supplies European countries with processed fish products such as smoked fish (salmon and trout), canned fish (herring, mackerel and sprat) and ready-to-eat fish products (salads and fish in marinades). Other products include fresh and frozen cod fillets, ready-to-prepare frozen fish fillets (breaded fillets), freshwater and diadromous fish (pike-perch), and fresh and frozen whole fish (trout, sprat). In 2015 the overall output of the Polish fish processing industry amounted to 468,900 MT, worth PLN 9.1 billion (U.S.\$ 2.4 billion). There are 262 processing plants eligible for export to the European Union and several hundred small, often family run companies, permitted to sell products only to regional markets - these are e.g. small processing plants next to fisheries. In 2015 the industry employed approximately 12,000 people.

### Output of Fish Processing Industry (000MT)

	2012	2013	2014	2015	2016*
Production of fish	423.2	466.2	447.8	468.9	495.0
• Fresh and frozen fish	60.0	83.3	65.1	51.2	25.0
• Fresh and frozen fillets	46.9	52.2	60.2	68.5	95.0
• Salted fish	19.7	19.6	19.1	19.9	21.0
• Smoked fish	85.1	89.9	82.5	91.5	102.5
Processed or tinned fish	199.3	208.9	207.6	225.2	243.5
• Tinned fish and preserves	67.3	68.8	69.9	77.9	84.5
• Pickled fish	87.1	87.1	88.5	92.0	94.0
• Culinary and delicatessen products	44.9	53.0	49.2	55.3	59.0
Processed fish by species					n/a
• Salmon	8.7	14.1	6.8	8.8	
• Herring	106.0	105.5	106.2	112.6	
• Sardines and sprats	12.6	13.6	12.2	14.2	
• Mackerel	9.8	9.6	10.8	12.2	
• Tuna	0.5	0.1	0.3	0.3	

Source: Institute of Rural Economics, Fish Market, October 2016; \*Estimate

#### Aquaculture sector

Aquaculture production is situated in land-based freshwater farms and is carried out in traditional earth ponds in 2 or 3-year cycles. In 2015 total national aquaculture production reached 38,000 MT, a five percent decrease compared to 2014. The decrease of production of carp and trout in 2015 stemmed from shortages of water caused by deteriorating hydrologic situation caused by climate change especially in Wielkopolska and Lublin provinces. The biggest category is carp production which in 2015 amounted to 17,750 MT and made up almost 50 percent of total aquaculture output in 2015. Carp farming is carried out in earth ponds on traditional land-based farms. The total registered area of carp farms in the country is about 70,000 hectares, the largest in Europe. The output of rainbow trout in 2015 was 15,800 MT. The development of trout farming in Poland started at the end of 1990s, and production has been stagnating over the past few years. Trout production is carried out in intensive fish production facilities and trout is harvested when it reaches the size of about 200-450g. Trout farms are located in the North, on the Baltic Sea coast, and in the south, in the Carpathian foothills.

## **Consumption**

In 2015 average annual fish consumption in Poland was 12.5 kg/per capita, almost 50 percent of average per capita fish consumption in the EU. In 2015 consumption of fish was seven percent lower than in 2014 mainly due to reduced consumption of cod and salmon caused by competition from cheaper pork and poultry meat. Pollock, herring and mackerel are the most popular saltwater species, while carp, trout and panga are the most popular freshwater species. Since 2007 panga consumption has significantly declined due to perceived inferiority and health concerns. In the same time period pollock, herring and trout have gained traction in the market, indicating a structural change in consumption.

Consumption of pollock, the number one fish consumed in Poland, is growing due to relatively low prices compared to other fish and because of improved quality stemming from increased imports from the United States. There is a growing awareness among Polish consumers regarding fish and seafood consumption. They are choosing fish products with more care and attention, are getting information about products, and are benefiting from campaigns promoting consumption and the health benefits of fish and seafood.

## **Distribution**

Seafood is sold in stores ranging from specialized stores, supermarkets, and hypermarkets, to small independent grocers. The greatest variety of processed fish products is found in specialized stores, supermarkets, and hypermarkets, the latter two of which dedicate the most shelf space and offer a selection of processed seafood products much broader than that of most U.S. stores. Many hypermarkets also feature extensive displays for fresh seafood products including live fish (in tanks) for purchase. Small independent grocers typically lack fresh options but instead offer processed, brand labeled options or frozen filets frequently with no brand association. Carp is the most traditional national species. It is served during the Christmas period in Poland, when the market supply of carp is at the highest level.

## **Annual Consumption of Fish in Poland** (kilograms of live weight/capita)

	2013	2014	2015
<b>Total Fish and Seafood</b>	<b>12.2</b>	<b>13.4</b>	<b>12.5</b>
• Pollock	2.7	2.9	2.9
• Herrings	2.0	2.1	2.3
• Mackerel	0.9	0.8	0.9
• Cod	0.8	1.4	1.1
• Panga	0.8	0.6	0.5
• Sprat	0.7	0.9	0.4
• Salmon	0.7	1.3	1.1
• Carp	0.5	0.6	0.5
• Tuna	0.5	0.4	0.5
• Hake	0.4	0.3	0.4
• Other	1.0	0.8	0.5

Source: Institute of Rural Economics.

## Trade

### Imports

In 2015 Poland imported 501,338MT of fish and seafood for a value of almost U.S. \$1.8 billion. Compared to 2014, there was a slight increase in volume and a 14 percent decrease in value of exported fish. The decrease of value of imports resulted from reduced prices and changes of exchange rate. Norway was the main supplier of fish as raw materials to Poland, while other significant partners include Sweden, Denmark, Germany, China, United States, the Netherlands and other countries. Poland is one of the biggest salmon importers in the world, supplied mostly by Norway, Sweden and the United States. In 2014 Poland imported mostly salmon, mackerel, cod and haddock from Norway, cod from Denmark and Russia, and mackerel from the Netherlands. During the first eight months of 2016 the volume of imports was 3 percent higher than in the same period of 2015, the value of imports increased by 15 percent because of higher import prices.

### Value of Imports of Fish and Seafood Products to Poland

Partner Country	U.S. \$000				% Change 2016/2015 (Jan-Aug)
	2013	2014	2015	2016 (Jan-Aug)	
World	1,913,260	2,058,196	1,778,779	1,233,673	15
Norway	826,582	907,986	748,846	572,135	27
Sweden	104,382	146,973	135,675	96,262	18
Denmark	99,339	114,092	120,645	82,037	9
Germany	171,740	147,691	114,549	67,734	-8
China	135,257	122,274	112,526	65,440	-8
Russia	44,907	59,917	61,066	49,846	32
<b>United States</b>	<b>49,290</b>	<b>48,818</b>	<b>55,490</b>	<b>28,077</b>	<b>15</b>
Iceland	49,208	45,730	44,448	25,520	30
Netherlands	54,167	47,328	40,603	22,852	-10

United Kingdom	70,888	92,771	38,719	28,426	24
Chile	44,296	48,624	38,084	27,639	26

Source: Global Trade Atlas

Poland imports mainly raw fish which is used by the local industry for further processing. Import of salmon depends mainly on the possibility of exporting processed products. However, in 2015 higher prices reduced domestic consumption of salmon and resulted in lower imports. Import of herrings is also decreasing due to the decline in domestic consumption. Imports of pollock are growing due to higher demand for the product from the United States because consumers perceive it as having higher quality compared to pollock imported from China.

### Volume of Imports of Fish and Seafood Products to Poland (000 MT)

	2013	2014	2015	I-VI 2016	I-VI 2016/2015 (%)
Live fish	4.9	4.6	4.7	1.4	0
Fish, fresh or chilled excl. fillets	139.6	161.2	176.1	79.6	-7
Fish, frozen, excl. fillets	96.0	96.2	87.7	52.0	15
Fish, fillets	188.2	187.1	182.9	93.1	18
Fish, dried, salted, smoked or in brine	1.8	3.4	3.0	0.9	-31
Crustaceans, live, fresh, chilled, frozen, dried	7.3	8.6	9.9	4.1	-15
Processed fish and caviar	42.6	47.2	48.5	20.0	-10
<b>Total</b>	<b>504.9</b>	<b>532.5</b>	<b>533.3</b>	<b>263.2</b>	<b>5</b>

Source: Institute of Rural Economics

After a one percent decline in 2014, imports of fish and seafood products from the United States in 2015 are expected to remain at the previous year's level because reduced imports of salmon are expected to be offset by higher purchases of Alaska Pollock.

### Value of Imports of Fish and Seafood Products from the United States (U.S. \$000)

HS code	Commodity	2013	2014	2015	2016 (Jan-Aug)	2016/2015 (Jan-Aug)
	Total Fish & Seafood Products	49,290	48,818	55,490	28,077	15
30475	Alaska Pollock Fillets, Frozen	15,532	22,175	23,406	18,709	19
30481	Pacific, Atlantic And Danube Salmon Fillets Frozen	15,857	16,645	23,049	1,196	-62
30494	Alaska Pollock, Frozen, Except Fillets	6,141	5,483	7,149	5,542	27
30495	Fish Of Families Bregmacerotidae Etc, Frozen	727	380	1,199	740	18
30311	Sockeye Salmon, Excl Fillet, Livers & Roes, Frozen	8,863	1,850	166	1,521	n/a
30721	Scallops Incl. Queen Scallops, Live, Fresh, Chilled	16	16	121	7	-93
30489	Fish Fillets, Frozen	52	84	107	n/a	n/a
30471	Cod Fillets, Frozen	0	0	81	5	-93
30367	Alaska Pollock, Frozen	76	0	79	44	-44
30622	Lobsters, Live, Fresh, Ch, Dried, Salted or in brine	41	28	26	87	749

30749	Cuttle Fish & Squid, Froz, Dri, Salted or in brine	1	19	20	n/a	n/a
30319	Pacific Salmon, excl. Filet, Liver,Roe, Froz.	25	22	15	6	-62
160420	Fish, Prepared Or Preserved	1	8	15	n/a	n/a

Source: Global Trade Atlas

## Exports

In 2015 Polish exports of fish and seafood products amounted to U.S.\$ 1.7 billion, a 13 percent decrease in comparison to the previous year. Major destinations of Polish exports of fish were Germany (smoked salmon, herring, cod, trout), France (smoked salmon, fish fillets), United Kingdom (prepared fish, cod), Denmark, Romania (herrings), Italy and Vietnam. In the first eight months of 2016 exports increased by eight percent because of higher sales to Germany.

### Value of Exports of Fish and Seafood Products (U.S. \$000)

	2013	2014	2015	2015/2014 (%)
World	1,789,321	1,925,952	1,677,155	- 13
Germany	1,022,484	1,079,930	934,723	- 13
France	169,419	167,800	143,457	- 15
United Kingdom	115,683	137,801	103,537	- 25
Denmark	82,836	97,186	94,620	-3
Italy	59,635	88,113	80,943	- 8
Vietnam	32,587	36,758	32,695	-11
Czech Republic	33,066	37,737	30,261	- 20
<b>United States</b>	<b>43,046</b>	<b>35,097</b>	<b>30,025</b>	<b>- 14</b>
Sweden	19,455	22,691	26,448	17
Romania	22,203	22,647	22,856	1
Belgium	26,300	34,257	22,506	- 34
Netherlands	22,309	22,634	16,973	- 25

Source: Global Trade Atlas

In 2015 Polish exports of fish and seafood products to the United States amounted to U.S.\$ 30 million, a 14 percent drop in comparison to 2014. The decrease of exports to the United States stemmed from reduced sales of herrings, smoked salmon and sardines. In the first eight months of 2016 exports to the U.S. increased by 20 percent because of higher sales of sardines.

### Value of Exports of Fish and Seafood Products to the United States (MT)

HS Code		2013	2014	2015	2015/2014 (%)
	Total	43,046	35,097	30,025	-14
160412	Herrings Prep Or Pres, Whole Or In Pieces	14,420	11,531	7,318	-37
30541	Pacific, Atlantic And Danube Salmon, Smoked	5,549	8,001	5,741	-28
30481	Pacific, Atlantic And Danube Salmon Fillets Frozen	2,968	1,438	5,649	293
160413	Sardines/Sardinella/Brisling Prep/Pres, Not Minced	15,784	9,249	4,455	-52
30489	Fish Fillets, Frozen, Nesoi	878	2,058	3,300	60
30471	Cod Fillets, Frozen	2,108	1,391	2,010	45

160420	Fish, Prepared Or Preserved, Nesoi	966	832	923	11
160415	Mackerel, Prepared Or Preserved, Not Minced	114	352	389	11
30499	Fish Meat, Frozen, Except Steaks And Fillets Nesoi	208	39	124	217
160419	Fish, Prepared Or Preserved, Whole Or Pieces Nesoi	25	124	106	-15
160411	Salmon, Prepared Or Preserved, Whole Or Pieces	23	83	10	-87

Source: *Global Trade Atlas*

## Current Tariff for Seafood Products

Tariffs for seafood products exported to the EU range from zero to 22 percent depending on species, level of processing, and the time of year. Detailed information on seafood tariffs can be found in the official [EU Journal](#) in pages 47-69 and 134-139. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2012:304:0001:0915:EN:PDF>

## Market Access

A health certificate issued by a government-approved veterinarian from the exporting country must accompany all fish shipments to Poland. Products packed for retail sale also must bear a label in the Polish language with the date of production clearly stated. Exporters should also check with Polish importers regarding standards.

For guidelines regarding seafood exports to Poland and the EU in general, information is available from the National Oceanic and Atmospheric Association, [NOAA](#).  
<http://www.seafood.nmfs.noaa.gov/Howtoexportseafood2013.pdf>

## Market Entry Strategy

Trade missions coordinated through industry/export organizations as well as participation in trade shows such as the annual European Seafood Exposition in Brussels are important in gaining knowledge about the market structure, consumer preferences and building contacts with importers. Poland has its own tradeshow, POLFISH, held biannually in Gdansk on the Baltic Sea in Northern Poland. The next POLFISH trade show is scheduled for June 2017.

U.S. exporters of seafood products may also obtain a list of current importers by contacting the Office of Agricultural Affairs of the U.S. Embassy in Warsaw.

## Trade Shows and Contact

### European Seafood Exposition, Brussels, Belgium

April 25-27, 2017

<http://www.seafoodexpo.com/global/>

**POLFISH Trade Show, Gdansk, Poland**

June 7-9, 2017

<http://www.eventseye.com/fairs/f-polfish-14935-1.html>

For more information concerning market entry and a current importer list contact:

**Office of Agricultural Affairs, Warsaw, Poland**

Embassy of the United States of America

Dr. Piotr Rucinski or Jolanta Figurska

E-mail: [Piotr.rucinski@fas.usda.gov](mailto:Piotr.rucinski@fas.usda.gov); [Jolanta.Figurska@fas.usda.gov](mailto:Jolanta.Figurska@fas.usda.gov)

Tel: (48-22) 504 2349 or (48-22) 504 2324

**End of Report.**